

**Borrowing and modifying performance measurement ideas** is easier than creating them from scratch. Below are 30 sets of ideas you can use to more quickly create goals for some of your organization's positions.

Each example contains **results-based goals** for a particular position. The left-hand column contains the **value-added results** this position might be expected to produce. The right hand column contains the **verifiable goals** which define meeting expectations for each result.

Each set of measurement ideas could be used as a basis for creating a shorter, more focused, and **customized performance plan** for a particular employee. Improved employee performance results when this customized performance plan is used for:

- A **performance planning discussion** at the start of the year
- Ongoing **data-based feedback** during the year
- Data-based **performance evaluation** at the end of the year

#### CONTROLLER

Results/Weights	Goals
Financial reports and forecasts (30%)	<p>For each report, once a year, end users say that:</p> <ul style="list-style-type: none"> <li>• The report data is accurate.</li> <li>• They can't operate without the report.</li> <li>• They understand the data and how it is organized.</li> <li>• The report comes in time for the data to be useful.</li> <li>• Users or auditors find no errors.</li> </ul> <p>Exceeds = Controller initiates unasked for ideas for improving the reports (or creating new reports) which the end user agrees to. All reports are delivered by agreed-upon deadlines.</p>
Paid taxes and government reports (20%)	<p>No reports or tax returns rejected due to incompleteness or errors. No penalties are assessed. All reports or tax returns are delivered by set deadlines.</p>
Completed special projects (15%) <ul style="list-style-type: none"> <li>• Continuing property records</li> <li>• (other projects to be added as assigned)</li> </ul>	<p>Identify cost of length of mains (by location, size, date, etc.) by December 199X. Supervisor judges the costs as reasonable and they tie into the general ledger.</p>

Company controls in place (10%)	Outside accounting firm, company auditor, and supervisor judge that controls are adequate in all locations and for all procedures and processes. Districts are reviewed four times a year. Exceeds = Other companies use this company's controls as a model.
Productive subordinates (10%) <ul style="list-style-type: none"> <li>• Provided direction</li> <li>• Priorities/ scheduling</li> <li>• Information</li> <li>• Training</li> <li>• Feedback</li> </ul>	Supervisor is satisfied that: <ul style="list-style-type: none"> <li>• Employees are empowered to do the new tasks.</li> <li>• Tasks are being delegated.</li> <li>• All employees receive an annual performance review.</li> <li>• Employees have skills and knowledge to do their jobs.</li> <li>• All employees have written performance standards.</li> <li>• Evidence of an informal and formal recognition system exists.</li> <li>• All employees can describe how they're doing compared to their standards.</li> <li>• Salary increases are differentiated based on performance and are consistent with the performance review.</li> </ul>
Paid employees (10%)	No scheduled payroll or reporting dates are missed.
Productive subordinates (cont'd)	<p>Surveyed employees say:</p> <ul style="list-style-type: none"> <li>• They understand the company's direction, their departments goals, and their role in achieving these goals.</li> <li>• They understand specifically what their supervisor expects of them.</li> <li>• They understand how well they are performing and where they need to improve.</li> <li>• Their performance appraisal accurately reflects their performance.</li> <li>• They have the necessary tools and resources to accomplish their work. Where they do not have what they need, they understand why not.</li> <li>• They have the skills and knowledge they need to do their jobs or there is a plan to obtain them.</li> <li>• Their good performances are acknowledged and appreciated.</li> </ul> <p>Exceeds = Employees are trained to advance to higher levels of responsibility. Other departments ask to hire this supervisor's employees.</p>
Paid invoices (5%)	Invoices paid within 30 days.

	<ul style="list-style-type: none"> <li>• Discounts are taken for early payment whenever possible.</li> <li>• Appropriate use/sales tax is paid.</li> <li>• Payments are in compliance with procedure.</li> <li>• Maintain "Avg. 30 day" D&amp;B rating.</li> </ul>
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## LAWYER

Results	Goals
<b>Legal and ethical representation of company and products in the marketplace</b>	<p>Clients say they understand what they need to do to get/keep Company in compliance with applicable laws, regulations and ethical standards.</p> <p>Clients first hear of legal implications of outside developments from the Associate General Counsel (AGC).</p>
<b>Legal advice</b>	<p>Clients are in compliance with the AGC's legal advice.</p> <p>Client is satisfied that:</p> <ul style="list-style-type: none"> <li>• The advice is relevant to their situation.</li> <li>• Their needs were addressed and the cost/benefit relationship of the advice is positive.</li> <li>• The advice was received in time to be useful.</li> </ul>
<b>Executed agreements</b>	<p>The client and vendor are satisfied that the agreements:</p> <ul style="list-style-type: none"> <li>• Are complete, readable and comprehensive.</li> <li>• Are completed in time to avoid delaying the work.</li> <li>• The client is satisfied that the agreements:</li> <li>• Contain favorable terms for the company.</li> <li>• Describe what the company gets and gives as part of the business terms.</li> </ul> <p>Exceeds = The execution takes less time than the parties expected.</p>
<b>Prevented litigation</b>	General counsel is satisfied with:

	<ul style="list-style-type: none"> <li>• The reduction in the number of matters going into litigation.</li> <li>• Clients' comprehension and compliance with legal advice.</li> <li>• How quickly clients are provided information they need to prevent litigation.</li> </ul> <p>Exceeds = Litigation is eliminated.</p>
<b>Resolved litigation</b>	<p>Cases are resolved in favor of the company. Cases are settled within the established settlement cap. Exceeds = Cases are settled below the established acceptable range.</p>

### PROGRAMMING TEAM LEADER

Results	Goals
<p><b>Computer systems to help people do their jobs</b></p> <ul style="list-style-type: none"> <li>• New systems</li> <li>• Enhanced/changed systems</li> <li>• Accurate and timely data</li> </ul>	<p>5 to 10 problem reports during the first 8 weeks. 95% transactions completed within 5 seconds (or agreed-upon standard). (Shared with Systems) 2 to 5 hours of system downtime per month. 98% to 100% days system is available between 7 AM and 9 PM. Actual cost or time savings is within 90% of projected study results. No more than 1 severe problem for a new system (many systems brought down, work cannot continue without the system, policies are updated incorrectly, takes more than 50 person hours to correct). Business partners are satisfied that:</p> <ul style="list-style-type: none"> <li>• System is being used.</li> <li>• Training is completed within the time agreed to.</li> <li>• System does what was agreed to.</li> <li>• Business partners and I/S peers are satisfied that the documentation is:</li> <li>• Being used as a training and troubleshooting tool.</li> <li>• Able to be used without asking questions.</li> <li>• Organized so that users can find topics without asking the author.</li> <li>• Stored in the places specified in the department standards.</li> <li>• Consistent with the current version of the system.</li> <li>• Help function says how to fix the error without calling someone else.</li> </ul>

	<ul style="list-style-type: none"> <li>• Meet agreed-upon deadlines for all projects.</li> </ul>
<b>Business partners trained to use new systems</b>	<p>All regional analysts are trained in the new system.          (Shared with regional analyst) All users are trained.          (Shared with regional analyst) No questions are asked of the help desk or problem reports submitted due to a lack of understanding of the system.          (Shared with regional analyst) I/S Analyst says that the business partners are able to use the system as agreed to in the requirements document.          Training is delivered within the agreed-upon training period.          Training is completed within the projected person hours.</p>
<b>Recommendations for new technology implementation</b>	<p>Committee or project team says the technical advice:</p> <ul style="list-style-type: none"> <li>• Helps them better define or solve the problem</li> <li>• Is in time to be useful</li> <li>• Is accurate</li> <li>• Manager says the technical advice is consistent with the department's goals and standards.</li> </ul> <p>Exceeds = Analyst is requested by name to give input.</p>
<b>Resolved problem reports</b>	<p>90% to 95% problem reports handled successfully (or no more than X to Y problem reports per year are not handled successfully):</p> <ul style="list-style-type: none"> <li>• Business partner agrees that the problem is fixed.</li> <li>• Solution doesn't cause new problems.</li> <li>• Problem is fixed the first time.</li> <li>• Solution doesn't affect system performance.</li> <li>• On large or complex problem reports:</li> <li>• Business partner agrees that the problem is fixed.</li> <li>• Solution doesn't cause new problems which could have reasonably been foreseen.</li> <li>• Solution doesn't affect system performance.</li> <li>• Problem is fixed within agreed-upon estimate of person hours.</li> <li>• Problem is fixed by agreed-upon deadline.</li> </ul>
<b>Satisfied business partners and agents</b>	<p>Supervisor hears business partners saying:</p> <ul style="list-style-type: none"> <li>• The team leader takes the time to answer my questions or finds the right person to answer the question.</li> <li>• The team leader asked for my opinion and</li> </ul>

	<p>used it (or explained why it was not possible to use my idea).</p> <ul style="list-style-type: none"> <li>• I was kept informed about the project status.</li> <li>• The team leader took my workload into account when setting the project schedule.</li> <li>• I was educated by the team leader to be able to participate fully in the project meetings.</li> <li>• I was involved only when I needed to be.</li> <li>• The team leader knew when to involve resources outside the project team.</li> </ul>
<b>Productive project team</b>	<p>The supervisor is satisfied that:</p> <ul style="list-style-type: none"> <li>• The team is meeting its deadlines.</li> <li>• The team leader identifies and tries to solve performance problems.</li> <li>• The team leader identifies team member training needs.</li> <li>• Surveyed team members say: <ul style="list-style-type: none"> <li>• They know their assignments and deadlines.</li> <li>• They receive help when needed.</li> </ul> </li> <li>• The team leader removes barriers getting in the way of doing their assignments.</li> <li>• The team leader is available to answer questions.</li> <li>• Their good performances are acknowledged and appreciated.</li> <li>• They are provided training needed to do their assignments.</li> <li>• They understand how their assignments fit into the team's project and understand how the team members fit together.</li> <li>• The team leader encourages team communication and unity.</li> </ul>

## DIRECTOR OF RESEARCH AND DEVELOPMENT

Results	Goals
<p><b>Aligned department resources</b></p> <ul style="list-style-type: none"> <li>• Mission, strategy, and plans, established, communicated, and understood by the organization</li> </ul>	<p>General Manager agrees that:</p> <ul style="list-style-type: none"> <li>• Research Services mission is aligned to business needs and that department missions exist and support Research Services mission.</li> <li>• Established strategies are likely to achieve the mission and are consistent with the corporate fiscal and human constraints and with Research Services values.</li> <li>• Capital, facilities, manpower, and operating budget plans have buy-in by senior</li> </ul>

	management, staff, and customers.
<b>Department organization</b>	
<ul style="list-style-type: none"> <li>Physical assets</li> </ul>	General Manager is satisfied that the Director has identified and prioritized needed physical assets and has presented clear, concise, and timely justification to acquire these assets.
<ul style="list-style-type: none"> <li>Realigned organizational structure</li> </ul>	General Manager agrees that the organizational structure supports the plan to achieve the mission. (Any change fixes a problem or provides a new capability a customer is asking for.) General Manager agrees that organizational structure changes were correctly identified as the preferred solution to problems and the changes were effectively implemented.
<ul style="list-style-type: none"> <li>Integration and communication mechanisms</li> </ul>	General Manager agrees that critical integration opportunities are identified and integrating mechanisms (checklists, procedures, performance standards, etc.) are in place within R&D to provide synergy in attainment of the Research Services mission. R&D employees understand their obligation to achieve the integration.
<ul style="list-style-type: none"> <li>Budget decisions</li> </ul>	General Manager agrees that fiscal decisions were consistent with department strategies, driven by sound need, cost effective, and sensitive to the current economic environment.
<ul style="list-style-type: none"> <li>Safe work environment</li> </ul>	Exceeds = No injuries. Minor first aid cases = Meets+. Recordable injuries " R&D injury rate = Meets. Recordable injuries > R&D injury rate = Below expectations. No more than 15 to 20 safety inspection citations/month. No repeat safety inspection citations. General Manager is satisfied that safety concerns have been addressed.
<ul style="list-style-type: none"> <li>Quality process implementation</li> </ul>	General Manager is satisfied that: <ul style="list-style-type: none"> <li>The Director R&amp;D is personally focused on being responsive to customer needs and creating continuous improvement, and has created subordinate performance measures that address these two factors.</li> <li>The employees of R&amp;D feel that the actions taken by the Director and rest of R&amp;D value the quality process (i.e. promotions, work assignments, and recognition are based on demonstrating quality behaviors.).</li> </ul>
<b>Productive human</b>	General Manager agrees that new employees make

<b>resources</b> <ul style="list-style-type: none"> <li>Diverse workforce</li> </ul>	<p>progress toward workforce diversity goals (female, mid-level manager, minority mid-level managers, and minority senior technologists). General Manager (based on discussions with female and minority staff) is satisfied that the Director has provided a supportive work environment that recognizes the unique needs of a diverse workforce.</p>
<ul style="list-style-type: none"> <li>List of replacement employees for critical jobs</li> </ul>	<p>General Manager agrees with the list of critical jobs. A back-up person is either ready to step into each critical job, or the candidate is gaining agreed-to skills, knowledge, and experience toward being ready to step in.</p>
<ul style="list-style-type: none"> <li>More knowledgeable and skilled employees</li> </ul>	<p>General manager is satisfied that R&amp;D employee development plans are clearly linked to performance improvement needs and new skill development is driven by the employee's interest in a given area or the needs of the organization.</p>
<ul style="list-style-type: none"> <li>Recognition and rewards</li> </ul>	<p>General Manager is satisfied that merit salary increases are differentiated based on performance (spread of increases between two percent and 12 percent).</p>
<ul style="list-style-type: none"> <li>Priorities and information</li> <li>Provided performance feedback</li> <li>Empowered employees</li> <li>Career development information</li> </ul>	<p>Employees surveyed say :</p> <ul style="list-style-type: none"> <li>They understand the company's direction, the department and their work units' goals, and their role in achieving these goals.</li> <li>They understand specifically what their supervisor expects of them.</li> <li>They understand how well they are performing and where they need to improve.</li> <li>Their performance review accurately reflects their performance.</li> <li>Their concerns are heard and appropriate steps are taken to address them.</li> <li>Their suggestions for improvements are expected and appreciated.</li> <li>They have the authority to make decisions and take actions to achieve the department's mission and they understand the limits of that authority.</li> <li>They have the necessary tools and facilities to accomplish their work. Where they do not have what they need, they understand why.</li> <li>They have the skills and knowledge they need to do their job or there is a plan to obtain such.</li> <li>Their good performances are acknowledged and appreciated.</li> <li>Their supervisor knows their career interests.</li> <li>They know the requirements for the positions they are preparing for.</li> <li>Every employee receives a performance appraisal at least once every 12 months.</li> </ul>



	<ul style="list-style-type: none"> <li>• Every employee receives two to three interim reviews each year, and performance plan changes and performance problems are documented as needed.</li> </ul> <p>General Manager is satisfied that special development plans exist for all high performers, that corrective action plans exist for all low performers, and that progress is being made on these plans.</p>
<b>Critical decisions</b> <ul style="list-style-type: none"> <li>• Strategy decisions</li> <li>• Organizational structure decisions</li> <li>• Personnel decisions</li> </ul>	<p>General Manager reviews a list of past years' decisions (concerning strategy, organizational structure, and personnel) and a description of their expected outcomes and is satisfied that the:</p> <ul style="list-style-type: none"> <li>• Success rate for the decisions was 60 percent to 75 percent.</li> <li>• Overall impact of the decisions produced significantly positive results and reflected a good balance of risk and potential reward.</li> </ul>
<b>Analytical services</b> <ul style="list-style-type: none"> <li>• Routine and non-routine analyses</li> <li>• Methods</li> <li>• Solutions to problems</li> <li>• New technology introductions</li> </ul>	<p>Customers say that:</p> <ul style="list-style-type: none"> <li>• All analytical requests were handled by the analytical technology centers (ATCs) either directly or through outside labs, or at the customers' request, the ATCs provided advice on where the work could be done.</li> <li>• They received the results by the agreed-upon completion date.</li> <li>• They were fully aware of the status of their work.</li> <li>• They were satisfied with the technical quality of the work.</li> <li>• General Manager agrees that the decisions to use internal vs. external resources to do analytical work maximized the value created by the ATCs.</li> <li>• General Manager agrees that the quality control standards are fully implemented and met, and the round robin and blind sample results are within the accepted standard deviations.</li> <li>• General Manager, consultants, and senior technical staff say that the analytical capabilities are state-of-the-art in all analytical areas currently critical to strategic R&amp;D programs.</li> <li>• General Manager is satisfied that the ATCs have recognized, planned for, and requested support to meet the future analytical needs of all strategic R&amp;D programs.</li> </ul>

<b>Safety, environmental, &amp; toxicological services</b> <ul style="list-style-type: none"> <li>• Policies</li> </ul>	<p>General Manager and Senior R&amp;D Management are satisfied that:</p> <ul style="list-style-type: none"> <li>• Policies support compliance with regulations, promote a safe and healthful work environment, are uniform, clear, and concise, and are not considered trivial.</li> </ul>
<ul style="list-style-type: none"> <li>• Trained employees</li> </ul>	<p>Training is responsive to government regulations, company policy, employee interests, and deficiencies in safety performance and that the training is provided at a level consistent with the resources supported by the customers.</p>
<ul style="list-style-type: none"> <li>• Audits</li> </ul>	<p>Safety audits are completed within agreed-upon time frames and person-hours of effort and focus on the areas agreed to in the audit guidelines.</p>
<ul style="list-style-type: none"> <li>• Information to support line management in the achievement of its Safety goals and environmental accountability</li> </ul>	<p>Line management received the manpower and expertise to help it achieve compliance with federal, state, and local regulations. The level of service is consistent with the resources supported by the customers.</p>
<ul style="list-style-type: none"> <li>• Interface with local and regional agencies and professional organizations</li> </ul>	<p>Relationships with local and regional agencies are positive and constructive (and not confrontational or adversarial) as judged by the General Manager.</p>
<b>Instrumentation and equipment services</b> <ul style="list-style-type: none"> <li>• Designs</li> <li>• Procurement decisions</li> <li>• Constructed and installed instruments and equipment</li> <li>• Repaired instruments and equipment</li> <li>• Functioning instruments and equipment</li> </ul>	<p>General Manager agrees that the decisions to use internal vs. external resources to do instrumentation and equipment work maximize the value created by instrumentation department.</p> <p>Customers surveyed say they are satisfied that the service provided met their needs, it was delivered on time and within budget, and that opportunities to review their decisions occurred during the work.</p> <p>General Manager is satisfied that the instrumentation department has acquired new customers by proactively identifying needs and applying its expertise to these needs.</p> <p>Novel products are protected with patents that are not easily circumvented and can be reasonably policed, or the inventions are hidden so that they cannot be reproduced by a competitor.</p>
<b>Lab support services</b> <ul style="list-style-type: none"> <li>• Space allocation</li> </ul>	<p>General Manager is satisfied that:</p> <ul style="list-style-type: none"> <li>• Space not being used for designed purposes is identified and alternative arrangements to</li> </ul>

decisions	<p>maximize space utilization are offered.</p> <ul style="list-style-type: none"> <li>R&amp;D Directors say Lab Services is responsive to their space needs and offers creative solutions to meet these needs.</li> </ul>
<b>Maintained R&amp;D buildings:</b> <ul style="list-style-type: none"> <li>Maintenance and repairs</li> <li>Renovations</li> </ul>	General Manager is satisfied that Lab Support Services takes initiative to keep the buildings functional and in good appearance, and things are fixed before asked or before they become a problem.
<ul style="list-style-type: none"> <li>Plans created for new facilities</li> </ul>	General Manager agrees that the plans for new facilities are based on updated manpower projections, functional needs of R&D, state-of-the-art technology in laboratory design, and flexibility.
<ul style="list-style-type: none"> <li>Modifications to existing facilities</li> </ul>	Customers surveyed say they are satisfied that the lab modifications met their needs, were delivered on time and within budget, and that opportunities to review their decisions occurred during the work.
<ul style="list-style-type: none"> <li>Waste management</li> </ul>	DER and EPA inspectors are satisfied that the waste management facilities comply with all applicable federal and state regulations. Customers are satisfied that the facilities meet their needs and the people who manage the facilities are helpful.

## SECRETARY

Value-Added Results	Performance Standards
<b>Typed documents</b>	Four to ten times/month document comes back for changes due to secretary error.
	Two to five times/month document not completed within agreed-upon deadline.
	<p>Supervisor surveys typing customers and hears that they received:</p> <ul style="list-style-type: none"> <li>Typed material with no typos or incorrect data, with correct page formatting, and with few or no grammatical errors.</li> <li>Documents within the agreed-upon deadlines.</li> <li>Exceeds = Supervisor says that edited copy was improved by the secretary. Documents' usefulness as a communication tool was enhanced by secretary-initiated formatting of key information such as bolding, indenting, etc.</li> </ul>

<b>Drafted notes, memos, letters, and routine requests for information</b>	<p>Supervisor says that the drafted/composed documents can be sent with only minor changes. Exceeds = Drafts and composed documents are produced with little or no up-front instructions and can be sent with only minor or no changes. Routine requests are handled correctly without any supervisor involvement.</p>
<b>Prepared reports</b> <ul style="list-style-type: none"> <li>• Monthly Visa</li> <li>• Quarterly Board Reports</li> <li>• Annual budget</li> <li>• Weekly calendar</li> </ul>	<p>Budget submitted by due date. 1 time/month weekly calendar not prepared and distributed prior to Wed. of week. Boss OKs budget numbers by due date. Visa processed on time.</p>
<b>Copies and faxes</b>	<p>No complaints concerning timeliness of photocopying. Fax sent before end of day (or sooner if required).</p>
<b>Sorted, prioritized, logged, routed, and referred mail</b>	<p>Supervisor satisfied that important mail is highlighted and mail is correctly grouped by importance. Exceeds = Supervisor never receives mail that could have been handled by someone else.</p>
<b>Processed follow-up file</b>	<p>1 incident/month where follow-up is not received on time. 3-5 times/month mail is not processed immediately after each mail delivery.</p>
<b>Travel arrangements and itineraries</b>	<p>Supervisor surveys travelers and judges the following:</p> <ul style="list-style-type: none"> <li>• Arrangements match what was requested (seating, tickets correct, etc.).</li> <li>• Reservations exist for hotels, cars, etc.</li> <li>• Itineraries are complete.</li> <li>• Expense reports are completed and audited.</li> </ul>
<b>Meetings ready to run</b> <ul style="list-style-type: none"> <li>• Prepared materials</li> <li>• Scheduled conference rooms</li> <li>• Arranged refreshments</li> <li>• Obtained equipment</li> </ul>	<p>Participants say everything was available for the meeting. Meetings run smoothly without the participants having to leave the meeting to solve problems. Supervisor says that:</p> <ul style="list-style-type: none"> <li>• Meetings were set up in a timely manner, considering the availability and necessity of participants.</li> <li>• Participants received the necessary background material for the meeting in a timely manner.</li> <li>• A meeting room, audio-visual (A/V) equipment, and refreshments were provided as requested (and canceled, if the meeting</li> </ul>

	<p>was canceled).</p> <p>Exceeds = Meeting materials and arrangements were provided with no supervision.</p>
<b>Up to date calendar</b>	<p>Supervisor says:</p> <ul style="list-style-type: none"> <li>• The Secretary can locate managers/staff when needed.</li> <li>• All meetings are logged with minimal supervisor involvement.</li> <li>• No meetings were missed by the Supervisor because they weren't on the calendar.</li> <li>• Calendar is always up-to-date.</li> <li>• Critical meetings are highlighted.</li> <li>• Necessary information for the meeting is obtained from others as needed.</li> <li>• Meeting schedulers say your supervisor is available for meetings.</li> </ul>
<b>Screened phone calls</b>	<p>Supervisor surveys callers and hears that:</p> <ul style="list-style-type: none"> <li>• Secretary gives the caller what was asked for instead of just taking a message.</li> <li>• Secretary is helpful and courteous in handling the calls.</li> <li>• Phone is always answered within three rings and is never left unattended within the department's definition of "business hours."</li> <li>• Supervisor receives few calls/messages that someone else could have handled.</li> <li>• Supervisor surveys recipients of messages and hears that detailed messages are always received promptly including, date, name, phone number of caller, and reason for call.</li> </ul> <p>Exceeds = Callers receive more useful information than they asked for and were offered alternatives for satisfying their requests.</p>
<b>Presentation materials</b>	<p>Supervisor satisfied that:</p> <ul style="list-style-type: none"> <li>• No typos in materials.</li> <li>• Appearance is good (handout copies are clean, tabs are correct and neat, overheads or slides have consistent design).</li> <li>• Supervisor instructions were required only at the start of the job.</li> </ul> <p>Exceeds = Secretary selects appropriate format and collects data as needed without supervisor involvement.</p>

<b>Responses to E-Mail and Voice Mail messages</b>	Supervisor surveys customers and hears that messages are responded to promptly and correct information is provided. Exceeds = Customers receive more useful information than they asked for and were offered alternatives for satisfying their requests.
<b>Completed and signed payroll</b>	Payroll department has sheets by 10:30 AM on required day.
<b>Arranged conference calls</b>	Participants have not missed any calls because they were not notified.
<b>Organized files</b>	Two to five times/month someone goes to the files and can't find what they're looking for. Supervisor surveys file customers who say that they can find what they're looking for and that the file index is up-to-date. Supervisor is satisfied that the Secretary can retrieve information quickly from the files. Supervisor is satisfied that only necessary information is in the department files (other information is stored in Stored Records, other departments' files, or is discarded). Every 10-14 months files are cleaned out and critical information is sent to Stored Records. Stored Records files are cleaned out and only critical information is kept. Stored Records journal is up-to-date and accurate.
<b>Accurate tickler file</b>	One to two times/quarter that some follow-up item "falls through the cracks".
<b>Completed special projects</b>	(To be agreed-upon when project is assigned.)
<b>Department supplies</b>	Users of supplies say that the supplies are: <ul style="list-style-type: none"> <li>• Available when needed (except for last-minute large orders).</li> <li>• Arranged in an orderly manner and are easy to find.</li> </ul>
<b>Up to date spreadsheets and databases</b> <ul style="list-style-type: none"> <li>• Entered data</li> <li>• Printed reports</li> <li>• Spreadsheets and database designs</li> </ul>	Five to ten entry errors/year. Users satisfied that the spreadsheet or database does what they want it to do. Exceeds = Secretary suggests spreadsheet/database applications to department employees before they are requested and employees use the suggested spreadsheet/database.
<b>Back-up support</b> <ul style="list-style-type: none"> <li>• Desk reference manual updates</li> <li>• Organized work station</li> </ul>	Supervisor satisfied with back-up secretarial support. Back-up secretary familiar with your job responsibilities and where things are located.

<ul style="list-style-type: none"> <li>• Trained back-up person</li> </ul>	
<b>Comfortable visitors</b>	<p>Supervisor satisfied with what the visitor says about how the secretary handled them (complaints or compliments).</p> <p>Supervisor surveys a sample of visitors and is satisfied that the visitors were greeted in a timely and courteous manner and requests for help were satisfied.</p> <p>Exceeds = Many visitors offer unsolicited compliments to the supervisor on the secretary's helpfulness.</p>
<b>Answers to customer questions and requests</b> <ul style="list-style-type: none"> <li>• Product information</li> <li>• Product literature</li> <li>• Pricing information</li> <li>• Answers to questions</li> </ul>	<p>Two to four justified complaints/year from customers. Supervisor surveys customers and hears that:</p> <ul style="list-style-type: none"> <li>• They received what they asked for, even when the request changed.</li> <li>• They were helped immediately and were not referred to someone else unnecessarily. The Secretary then followed up with the customer to make sure the customer's request was satisfied.</li> <li>• If a referral was necessary, they were introduced to the appropriate person, not just directed there, and the request was communicated to the appropriate person by the Secretary.</li> <li>• No complaints for poor service were received.</li> </ul> <p>Exceeds = Customers received more than they asked for and were offered viable alternatives for satisfying their requests.</p>
<b>Co-workers informed of information they need to know</b>	<p>Supervisor surveys co-workers and hears that the secretary:</p> <p>Communicates up, down, and across to keep them informed of the departmental/company information that they need to conduct their work.</p> <p>Recognizes what information is sensitive and maintains the necessary confidentiality.</p> <p>Exceeds = Secretary correctly decides, with minimal supervision, who needs to receive which information and how the information should be distributed (e.g. hand-carries critical information).</p>

## TRAINING COORDINATOR

<b>Results/Weights</b>	<b>Goals</b>
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<p><b>Certified programmers (30%)</b></p> <ul style="list-style-type: none"> <li>• Trained programmers</li> <li>• Hiring recommendations</li> <li>• Training materials</li> </ul>	<p>Supervisors of certified programmers say that the employee:</p> <ul style="list-style-type: none"> <li>• Could handle their assignments right away.</li> <li>• Didn't bother co-workers and supervisor for covered objectives.</li> <li>• Skill/knowledge assessment was accurate.</li> </ul> <p>Exceeds = Manager of Training is satisfied that the Supervisors of programmers feel that the certified programmers are being trained better than could be expected.</p> <p>Average of 18 to 25 working days to complete Phase I training.</p> <p>Average of 18 to 23 working days to complete Phase II training.</p> <p>Average of 10 to 15 working days to complete Phase III training.</p> <p>Recommended trainees complete the training within the above standards.</p> <p>Supervisor of the programmer and certified programmer say that the topics covered match what is needed on the job.</p>
<p><b>Functioning performance management system (20%)</b></p>	
<ul style="list-style-type: none"> <li>• Oriented employees</li> </ul>	<p>Supervisor is satisfied that the employees understand what was said and got all of their questions answered during or after the session.</p> <p>Orientation meetings and make-ups completed by deadline.</p>
<ul style="list-style-type: none"> <li>• Trained supervisors and employees</li> </ul>	<p>Overall rating of 3.5 to 4.0 on trainer effectiveness.</p> <p>All trainees meet all learning objectives.</p> <p>Training completed by deadline.</p>
<ul style="list-style-type: none"> <li>• Supervisors and employees using what they have learned</li> </ul>	<p>70% to 80% trainees meet all follow-up objectives.</p> <p>Exceeds = 20% to 30% of supervisors able to document measurable performance improvements.</p> <p>Follow-up completed by deadline.</p>
<ul style="list-style-type: none"> <li>• Trained new supervisors and employees</li> </ul>	<p>All new employees and supervisors get Phase I training within three months of hearing of hiring/promotion.</p>
<p><b>Trained employees (15%)</b></p> <ul style="list-style-type: none"> <li>• Management and supervisory training</li> </ul>	<p>Overall rating of 3.5 to 4.0 on trainer effectiveness.</p>



<ul style="list-style-type: none"> <li>• Personal computer training</li> <li>• Employment Equity training</li> </ul>	<p>All trainees meet all learning objectives during the session or a remedial session.</p> <p>Exceeds = Supervisors or managers request this particular trainer by name for future training programs.</p>
<ul style="list-style-type: none"> <li>• Sales training</li> </ul>	<p>Training completed by deadline.</p>
<ul style="list-style-type: none"> <li>• Training records up-to-date</li> </ul>	<p>100% of attendance sheets and 70% to 80% of evaluation data entered into system within two weeks after training.</p>
<p><b>Training plans (10%)</b></p>	<p>Internal customers agree that plan will meet their needs and commits dollars and trainee time.</p> <p>Supervisor satisfied that the training plan contains standard components, has realistic timelines and objectives, is based on input from representative sample, and is consistent with corporate long-range goals, objectives, and philosophy.</p> <p>Exceeds = Training curriculum is entered into Training Information Management System (TIMS) by specified date.</p> <p>Meet agreed-upon deadline for first approved draft.</p>
<p><b>Job aids (8%)</b></p>	<p>Client likes and uses job aid.</p> <p>Performance problem was solved.</p> <p>Exceeds = Clients are willing to accept a job aid instead of the training they initially requested, or they request job aids directly.</p>
<p><b>Customer service manual (5%)</b></p>	<p>Supervisor is satisfied that the manual:</p> <ul style="list-style-type: none"> <li>• Covers all job dimensions.</li> <li>• Has all standard components.</li> <li>• Customer service supervisor says the document is useful.</li> </ul> <p>Exceeds = Training Coordinator initiates this type of manual in another department.</p>
<p><b>Cross-trained analysts (5%)</b></p>	<p>60% to 80% trainees meet all learning objectives. Trainee's supervisors satisfied with analysts' improvement in their ability to communicate with programmers and solve minor problems without a programmer.</p>
<p><b>Training facility ready for training (5%)</b></p>	<p>Supervisor is satisfied that:</p> <ul style="list-style-type: none"> <li>• The training room is ready for training when</li> </ul>

	<p>needed.</p> <ul style="list-style-type: none"> <li>Materials are available.</li> <li>Needed resources have been communicated.</li> </ul>
<b>Useful documentation manuals (2%)</b>	<p>Supervisor is satisfied that:</p> <ul style="list-style-type: none"> <li>The bulk of the work is done by the new documentation specialist.</li> <li>No more than one day/month spent on the project.</li> </ul>
<ul style="list-style-type: none"> <li>Improvements to Training Department process</li> </ul>	<p>Exceeds = Training coordinator's work wins award and or recognition from some professional group.</p> <p>Exceeds = Training Coordinator initiates an unasked-for improvement in the efficiency or effectiveness of the department's training</p>

## CORPORATE TRAINING DIRECTOR

<b>Results /Weights</b>	<b>Goals</b>
<b>More productive employees</b>	<p>(Shared with line management) 50% to 70% of managers say the following about the employee's on-the-job performance (after completing their learning opportunities):</p> <ul style="list-style-type: none"> <li>The amount of observed production gain was worth more than the resources allocated.</li> <li>The employee can do new job functions.</li> <li>The employee can do their job functions in less time.</li> <li>The employee is able to make judgments more like those a supervisor would make.</li> <li>Average of 3 to 6 months cycle time from request to delivery.</li> </ul>
<b>Employees who meet learning objectives</b> <ul style="list-style-type: none"> <li>Computer-based training</li> <li>Technical training</li> <li>Employee training</li> </ul>	<p>75% to 90% of employees meet their learning objectives at the end of the learning opportunity.</p> <p>Actual department expenditures are <math>\pm</math> 5% to 10% of estimated budget.</p> <p>98% to 99% of projects, the employees receive the training by the agreed-upon schedule or deadline.</p>
More competent managers	X% to Y% of managers exhibit the minimum core leadership competencies.
<b>Information to support business objectives</b>	85% to 90% of users of research resources say that the corporate library has the information resources and services they need to support their business objectives.

<ul style="list-style-type: none"> <li>• Database searches and reports</li> <li>• Periodicals and books</li> <li>• Audio-visual and multimedia materials</li> </ul>	Actual corporate library expenditures are $\pm$ 5% to 10% of estimated budget.
<b>Employees who are able to develop their own career plan and manage their career</b>	85% to 95% of employees in a downsized area say they were helped to find another job. Management is satisfied with the number of employees in a downsized area who are placed inside the company.
<b>Core leadership practices which are integrated into all corporate training and development programs</b>	The current management training programs are reviewed and updated to reflect the core leadership practices.
<b>Training function which is aligned with business strategies</b>	Line management is satisfied that the Corporate Training and Development (CT&D) Department has staff who are knowledgeable about critical topic areas and have current T&D skills to meet their business needs. Line management volunteers information about future business and training needs without CT&D asking. CT&D has the capacity to meet line management's deadlines for training interventions.
<b>Functioning education center</b>	No more than 1-2 complaints per year are escalated to upper management.  Actual education center expenditures are $\pm$ 5% to 10% of estimated budget.
<b>Motivated and productive subordinates (20%)</b>	The VP HR is satisfied that: <ul style="list-style-type: none"> <li>• All employees have written performance standards.</li> <li>• All employees know how they're doing compared with their standards.</li> <li>• All employees receive at least one informal interim review per year.</li> <li>• All employees receive an annual written performance appraisal.</li> <li>• All employees are meeting their performance standards or there is a performance improvement plan in place.</li> <li>• A reward and recognition system exists and there is evidence of using the system.</li> <li>• Salary increases are differentiated based on performance.</li> </ul>
	Surveyed subordinates say:

	<ul style="list-style-type: none"><li>• They understand the company's direction, department's goals, and their role in achieving these goals.</li><li>• They understand specifically what their supervisor expects of them.</li><li>• They understand how well they are performing and where they need to improve.</li><li>• They have the necessary authority to perform their job.</li><li>• Their performance appraisal accurately reflects their performance.</li><li>• They have the skills and knowledge they need to do their jobs or there is a plan to obtain them.</li><li>• Their good performances are acknowledged and appreciated.</li><li>• Their decisions are not reversed without reason or explanation and their suggestions are taken seriously.</li></ul>
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